ixi-UMS Client Tools

Installation Guide

Onlineversion

Content

1   Overview

The "ixi-UMS Client Tools" contains various tools that can be used with the ixi-UMS Enterprise system. The functions can be individually selected during the installation.

1. Fax printer driver to send faxes out of different applications
2. Mail merge fax module and Auto fax module for MS Word (Word macro)
3. Fax, SMS buttons/menues for MS Outlook (add-in)
4. Sending of messages by Drag Drop (system tray)
5. Collecting faxes. This feature enables to print out of different applications (e.g. CorelDRAW file and Excel table) via the virtual printer driver and unite them in one fax (system tray)
6. ixi-UMS SMTP Mail Client with integrated address book
7. ixi-UMS PS-driver for the addressing of faxes via control characters
8. Connection to MAPIand SMTP-systems

The ixi-UMS Client Tools are optional and are installed exclusively at the clients, by no means at the ixi-UMS Enterprise-server.

The users do not have to start an application in order to be able to make use of the ixi-UMS Client Tools.
The needed "Prnd.exe" is started via an entry in the Autostart. The "Prnd.exe" takes care of the "transport" of the printed fax to the mail client.
Moreover, the features of the ixi-UMS system tray are controlled via this application.

Remark for the installation at a Citrix Server:
When the ixi-UMS Client Tools are applied on a Microsoft Terminal Server with Citrix in "Published Mode" you have to take care that this Prnd.exe is started per user and finished with the log off. The system tray, of course, is not available to this user. Furthermore, the necessary "IXI-spool" directory has to be set up at an LW, on which every user has unlimited access.

1.1   Requirements

Operating system:
- Windows 11 /10 (32/64 bit)
- Server 2016 / 2019 / 2022
- Terminal server and Citrix

In general:
- Office 2016 32/64 bit or higher

Remark:
For the operation of the ixi-UMS PS-printers, addressing of faxes via control characters. Ghostscript can be downloaded from www.sourceforge.net and be used free of charge.

The ixi-UMS Client Tools have been tested with the GhostScript Version:
9.18, 9,19,9,21 9.22, 9.26, 9.52
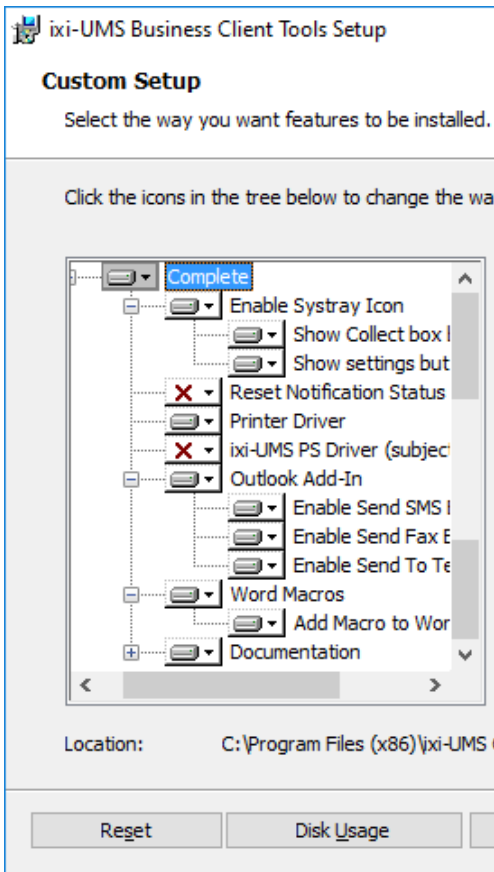The versions 9.20, 924 and 9.25 are not released

Necessary rights for installation:
- Administrator

In order to be able to install the Word macros, the Macro Security must not be set higher than "Medium".
All the users at the client must have unlimited access to the IXI-Spool directory.

1.2 Available Features

The ixi-UMS Client Tools consist of several features, which are optionally in parts.

The options that shall be installed can be seleceted at the setup.

Remark:
For the operation of the ixi-UMS PS-printers,
addressing of faxes via control characters.

Enable Systray Icon (Optional)
Activate the Systray icon. With a right mouse click the user can then, depending on the selection:

- collect / send faxes
- open the settings
- open the collection box

Please also read the user manual

Enable Systray Icon (Optional)	Enable systray icon. By mouse-click right, the user then can: Collect / send faxes Enter his phone extension in order to be able to forward voice mails Open the collect box See also User Manual
Reset Notification Status Button (Optional)	Extension of the Outlook add-ins and of the systray in order to reset the status of the notifications. See also User Manual.
Printer Driver	Installs the IFax-printer. Only with that the MS Words Macro can be used
ixi-UMS PS Driver (Optioal)	Installs the "ixi-UMS PS-printer". For the addressing of faxes via control characters
Outlook Add-In (Optional)	Drop-down menu in Outlook in order to: Send faxes, SMS out of the Contacts Reset the status of the notifications at the server (MWI) - optional Send voice mails to the telephone
Word Macros (Optional)	Copies the Word macros to the hard disk. From there, they can be "installed" per user. Needed for the creation of Auto fax and mail merge fax out of MS Word
Add Macro to Word (Optional)	Installs the Word macros for the user logged in
Documentation (Optional)	Copies the documentation to the disk and inserts a respective entry in the start menu

1.3 Client Connections

During the installation, you have to state whether or not the messages are passed on to a mail stystem and if so, in which way. Some "usual" combinations are described in the following.

MAPI

MAPI Clients mean mail clients like e.g. Outlook, Outlook Express, GroupWise, Notes 8.5 and higher and Hotmail.
The client is addressed, which is entered as mail client in the properties of the Internet Explorer at Programs.

The fax or the SMS is sent by the mail client.

SMTP

If you do not have an e-mail client at the workstation or do not want the faxes to be under "Sent Items", select "SMTP" on the Selection of the Messaging Platform tab. The user can open the ixi-UMS SMTP Client at any time via Start - Programs to send ixi-UMS messages and E-Mails (optional).
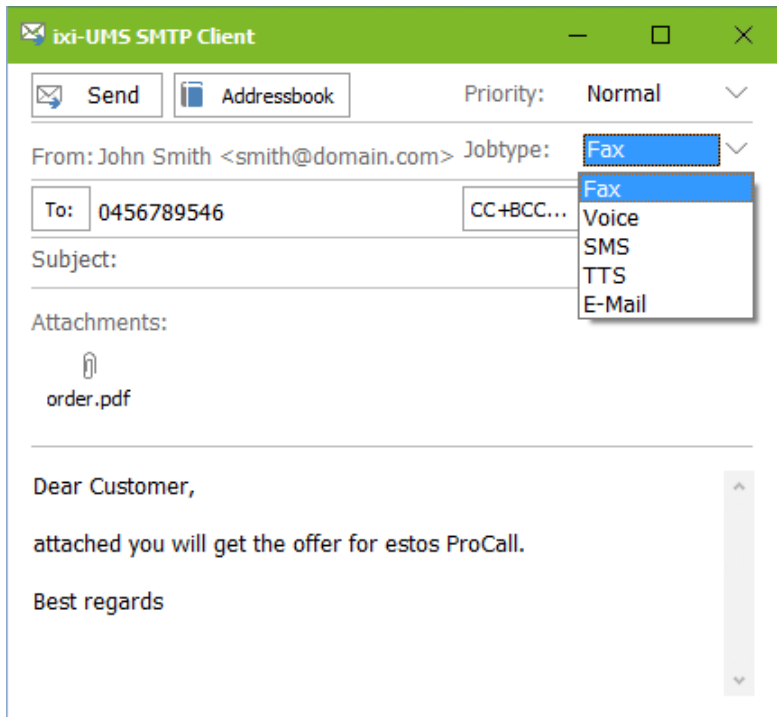
Also after printing on the ixi-UMS Fax Printer the ixi-UMS SMTP Client opens in which the recipient number is entered or selected from the address book.

During the installation, you have to determine the IP-address of the mail server or of the (ixi-UMS Mail Server Connector).

2 Installation via Software Distribution

The ixi-UMS Client Tools can either be installed manually at every client, via a group policy or via third party products (e.g. SMS-Server).

Please consider the installation of the printer drivers. With the ixi-UMS Client Tools , a "virtual" printer is installed. The **ixi-UMS Fax** printer has been tested and signed by Microsoft.

The ixi-UMS PS printer for the addressing of the faxes via control characters does not have a respective certificate. As a result, the operating system always asks whether the printer shall be installed.
An installation via GPO / software distribution thus is not possible.
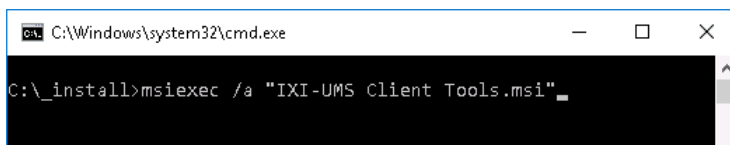
Note:

When an older ixi-UMS Client Tools-version has been distributed via "Batch"-file or manual, the ixi-UMS Client Tools is replaced, but is still displayed at "Programs and Features"
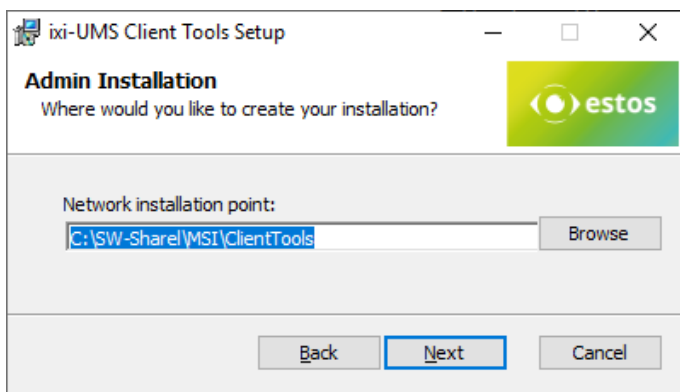
2.1 Preparation

The setup for the network installation by software distribution is a little different from the client setup.
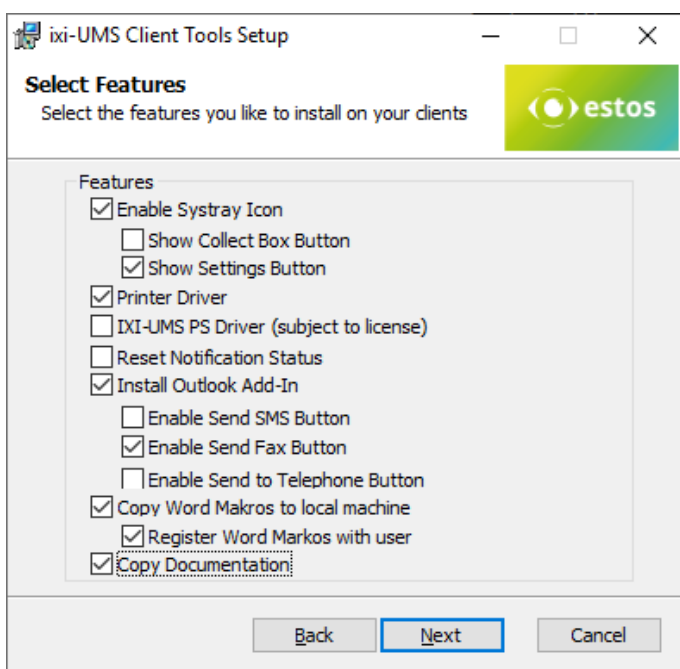Start the installation via Start - Execute msiexec /a "ixi-UMS Client Tools.msi".

Start the installation via Start - Execute msiexec /a "ixi-UMS Client Tools.msi".

You now have the option to state a directory where the prepared installation shall be deposited. This has to be a shared folder in the network.

After that you have to choose, which software components shall be installed on the clients.

See also "Available Features"

After that, Language, Messaging Platform, , Spool Folder and Allowed File Extensions are polled. Then the copy process starts.

2.2 Group Policy

For every organization unit, you can set up group policies, via that also the automatic installation of software is regulated. Start the "Active Directory User and Computer Management Console". Arrange your users or computers in a way that they have organization units.
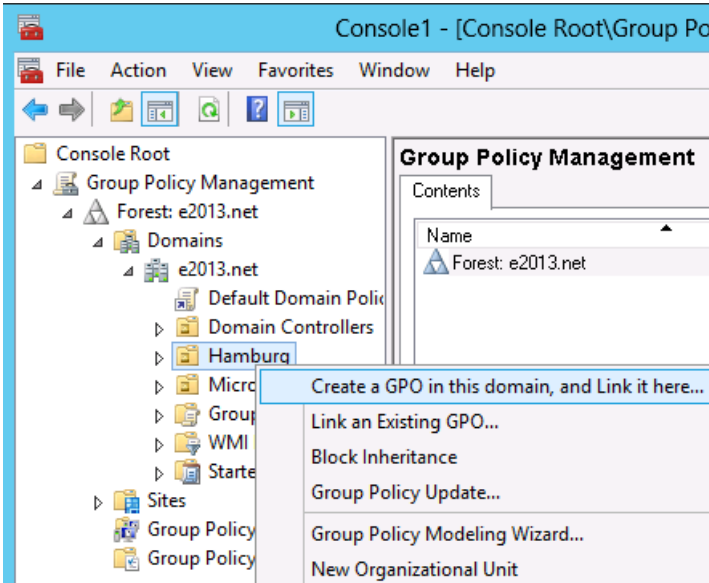
Installation per User:

The software is only available to this user. Moreover, the user guide and the start menu link are only available when this user logs in.
If another user of the same OU logs in, the software is re-installed.

Installation per Client/Computer

The software is available to any user that logs in. Manuals and start menu links have been set up at "All Users".

Depending on the Windows Server version, please open the properties of an organization unit in AD User- and Computers (Server 2003) or the Group Policy Management (since Server 2008).

Create a new group policy object. Open the group policy with Edit.
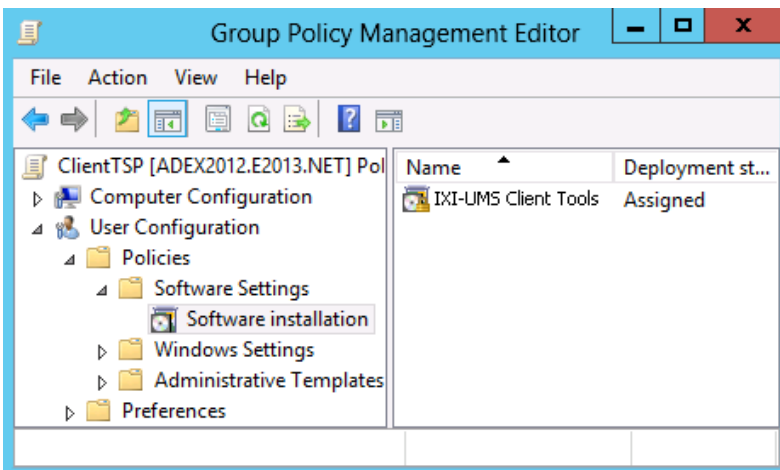
Add a new package at
User Configuration or Computer Configuration - Software Settings - Software Installation.

Now select the installation package you prepared beforehand via the administrative installation.

Please select as Deployment type: Assigned

If you like to install per User:
Open "Properties" and make the following settings:
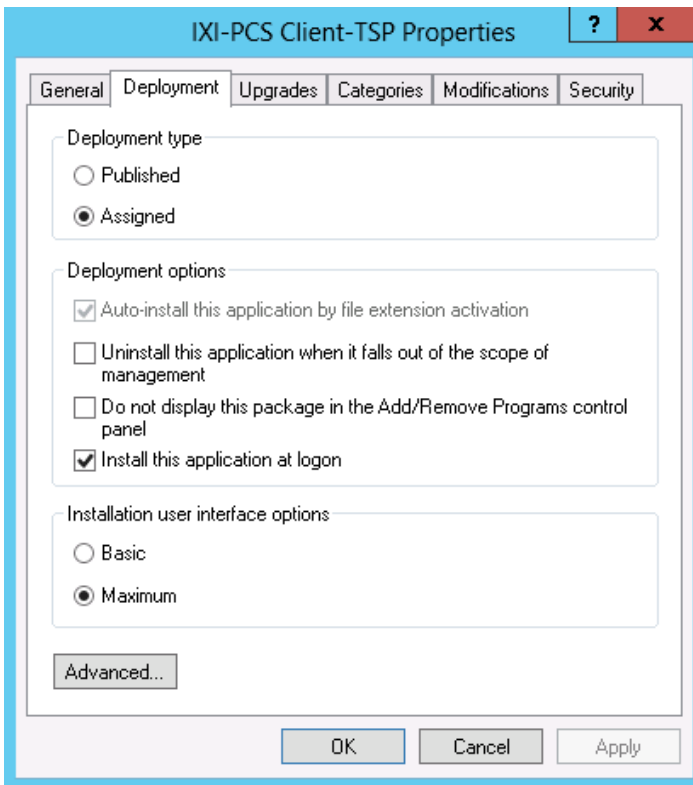
Tab "Deployment"
Deployment type: Assigned
Deployment options:
Install this application at logon

When publishing the 32bit IXI-PCS Client TSP, please add:

Button "Advanced":
Uncheck the option:
"Make this 32-bit X86 application available to Win64 machines"

Confirm all settings.

When a user who is member of the selected OU logs in at his PC, the assigned application is installed automatically.

See also the respective documentation about Windows Server, Active Directory and Group Policies.

3   Silent Installation - Parameter

The ixi-UMS Client Tools can be installed with the parameter 'silent' (eg via WSUS).

Example:
msiexec /i "ixi-UMS Client Tools.msi" ADDLOCAL=Printer_Driver,CollectBox SETUPTYPE="smtp"
ADDRESSTEMPLATE="$(Address)@$(AddrType).firma.de" SMTPHOST="Mailserver.business.com"
FROM=username@business.com" /qn

In the example set options:
installed features: printer driver and CollectBox
Settings: Setuptype: SMTP, Adresstemplate: number@fax.business.com SMTPHost: Mailserver.business.com, Sender: username@business.com

Possible settings/parameter:

Values for ADDLOCAL

CollectBox	Display of the Systray-Icon incl. all options
CollectBoxButton	Display of the Systray-Icon incl. "Collect files" and "Collect box"
SettingsButton	Display of the Systray-Icon incl. "Collect files" and "ixi-UMS Client Tools Settings"
MWIButton	Button "**Reset Notification Status**" in the systray and Outlook-Addin
Printer_Driver	Printer driver
PSPrinter_Driver	PS Printer driver
Outlook_Addin	Outlook Addin, contains **all** menu items
SMSButton	Outlook Addin, with menu item: **Send Fax**
FAXButton	Outlook Addin, with menu item: **Send SMS**
VoiceButton	Outlook Addin, with menu item: **Send to telephone**
Makros	Word Makros
Documentation	Manual

Folgende Einstellungen können angegeben werden:

SETUPTYPE	used plattform/delivery via, possible values: mapi oder smtp, Default: mapi
LANGUAGELIST	Language, possible values: ger, eng, fra, ndl, ital, por, spa -> Note: for OutlookAddin and Collect box are only german and english available, see also: Select Language Default: eng
ADDRESSTEMPLATE	definition for the adress templates, Default: $(Address)@ixi$(AddrType).com = number@ixifax.com
SPOOLDIR	path to the Spool-directory Default: C:\IXI-Spool
ALLOWEDEXSTS	Specification of the permitted file types, Default: *.*
WORDVERSION	Version of the WordMakros, 0 -> Word 2003 / 2007, 1 -> Word 2010 / 2013 / 2016, Default: 1
FULLPAGETIFF	Adjust Page Size to Din A4, 1 -> activated Default: leer
SMTPHOST	specification des SMTP Servers, Default: leer
SMTPPORT	specification des SMTP Server Ports, Default: 25
SMTPTLS	Activation of TLS Default: empty = off
FROM	mail adresse from the user Default: leer
PRNDBUTTONFAX=0 PRNDBUTTONVOICE=0 PRNDBUTTONSMS=0 PRNDBUTTONTTS=0 PRNDBUTTONEMAIL=0	Hiding the individual job types in the ixi-UMS SMTP Client and the collect box

If an entry is not available, the default value is entered or the required information is requested during the first use.
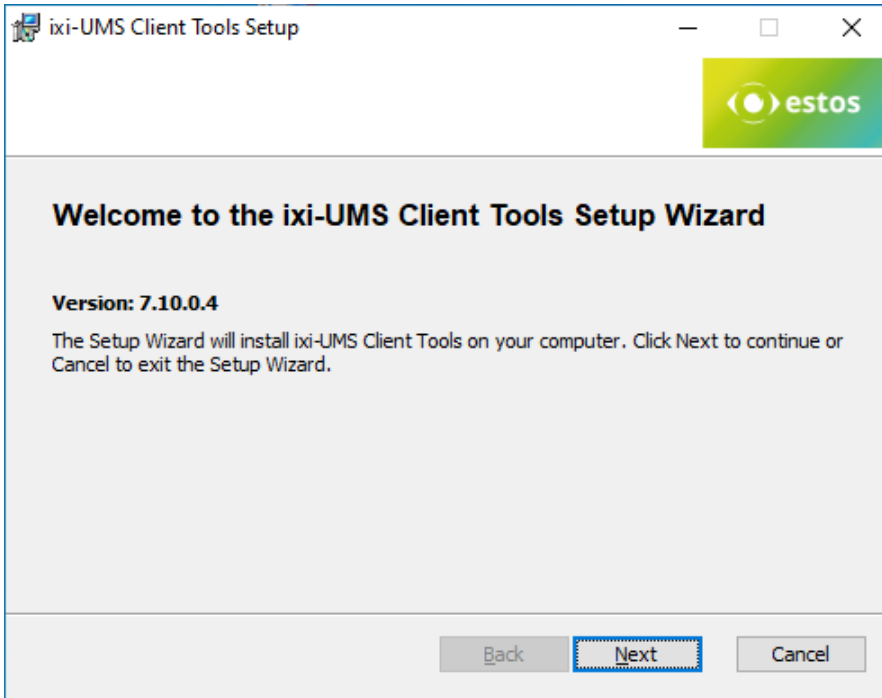
4 Single-PC installation

At the start of the setup you can select wich features should be installed.
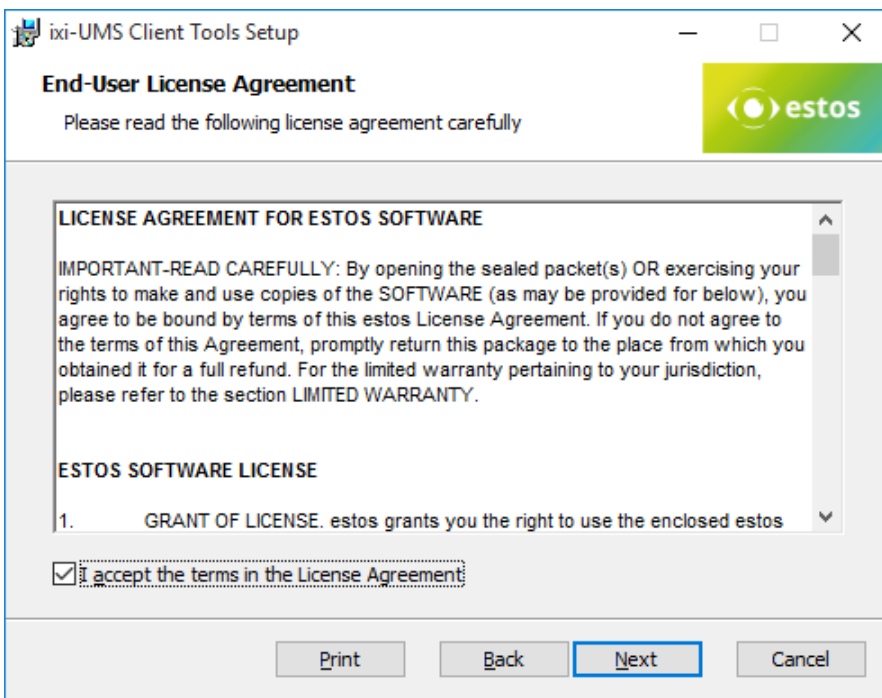
Installation at a client

In order to be able to finish the ixi-UMS Enterprise Client Tools installation successfully, you have to be logged in with an account that is allowed to install a local printer, e.g. the administrator.

4.1 Welcome

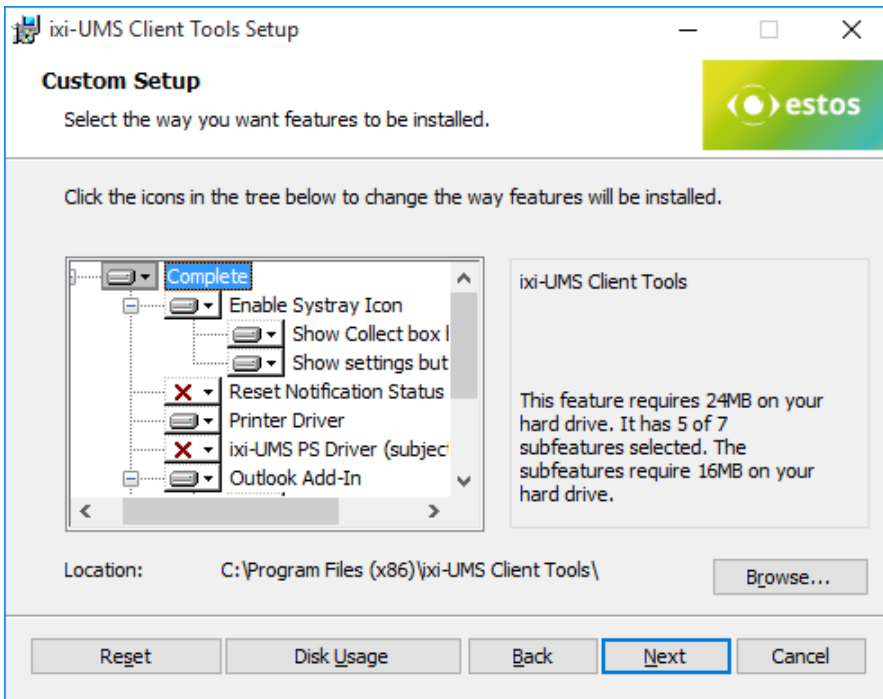After the welcome-screen with general instructions, the installation starts.

4.2 License Agreement

The end user's licence agreement is indicated.

Peruse this carefully and choose "I accept..."

Only then the installation can be continued.

4.3 Select Features

Here you have to choose, whether and which features you want to install.

For further information, please refer to "Available Features".

If ixi-UMS Client Tools shall not be installed in the default program directory, the path can be changed at "Location".

4.4 Select Language
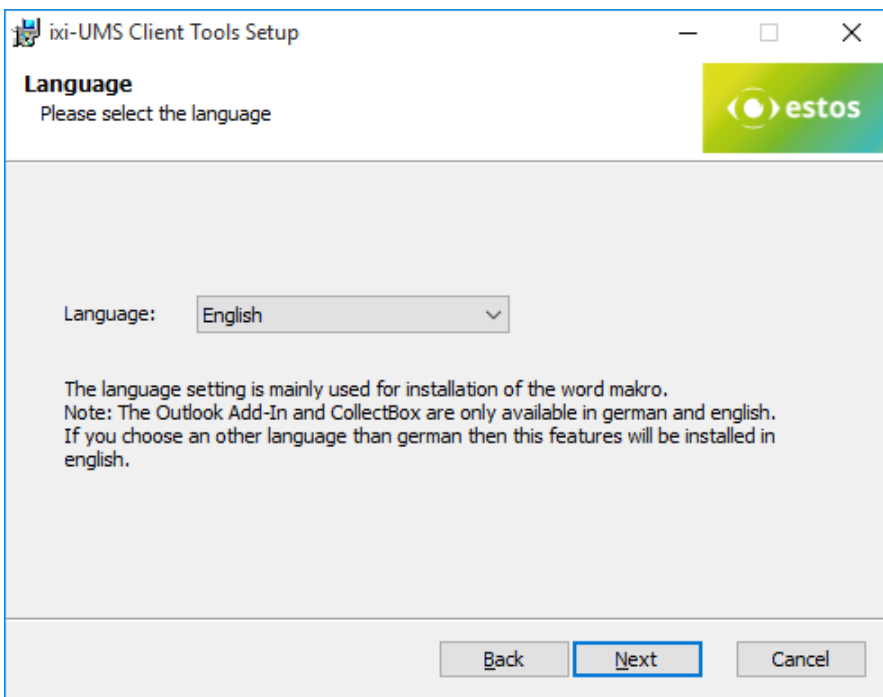
The language for
- Outlook Add-In
- Drop down menus
- Word Marco
are selected here.

The system tray and the Outlook Add-In are only available in German and in English. If you choose another language, the Word macro is registered in the chosen language and the Outlook Add-In and the system tray are installed in English.

4.5 Allowed File Extensions

Next, a list of the allowed file extensions can be stored in the ixi-UMS Client Tools and the services offered can be selected.

Allowed File Extensions
It is determined therewith which attachments are allowed to be sent via the CollectBox or ixi-UMS SMTP Client
The setting can optionally be stored in the "Prnd.ini" in the user profile at
C:\Documents and Settings\<User>\Application Data\estos\ixi-UMS ClientTools
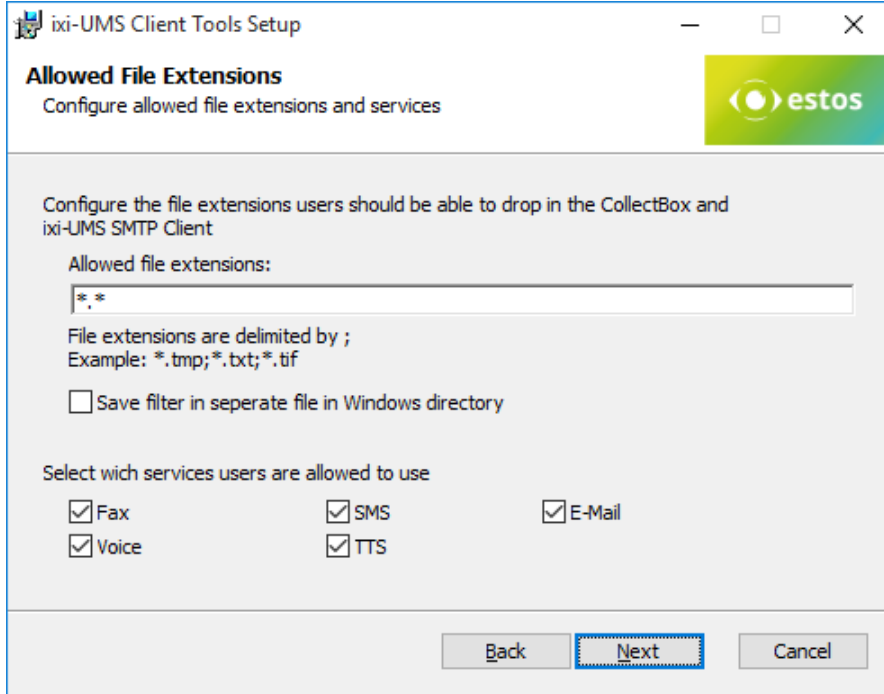
or in a separate file "IXICliFileExtFilter.ini" in the Windows installation directory.

This setting can be changed later if necessary.

Select services
Select which services are offered to the user to send the ixi-UMS messages in the collection box (Fax and/or Voice and/or E-Mail) and the ixi-UMS SMTP client (alle message type possible).

4.6 Select your Plattform

Here you have to choose, whether the mails are passed on to the mail system or the mail client and if so, in which way. Please see "Client Connections"
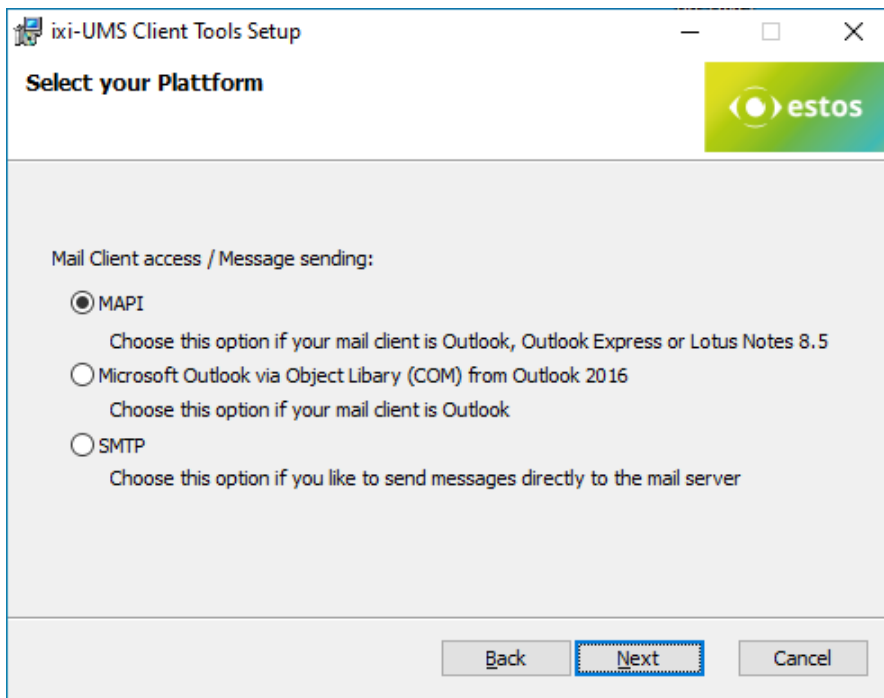
MAPI
For all mail clients that use the "MAPI"-interface

Microsoft Outlook
For Microsoft Outlook 2016 and higher, the transfer of files via Outlook's Object Libery should be used.

SMTP
Delivery via ixi-UMS SMTP Client directly to the mail server / ixi-UMS Enterprise Server. In a next step, you have to enter the IP-address of the mail server or the ixi-UMS Enterprise Server as well as the e-mail address of the sender.
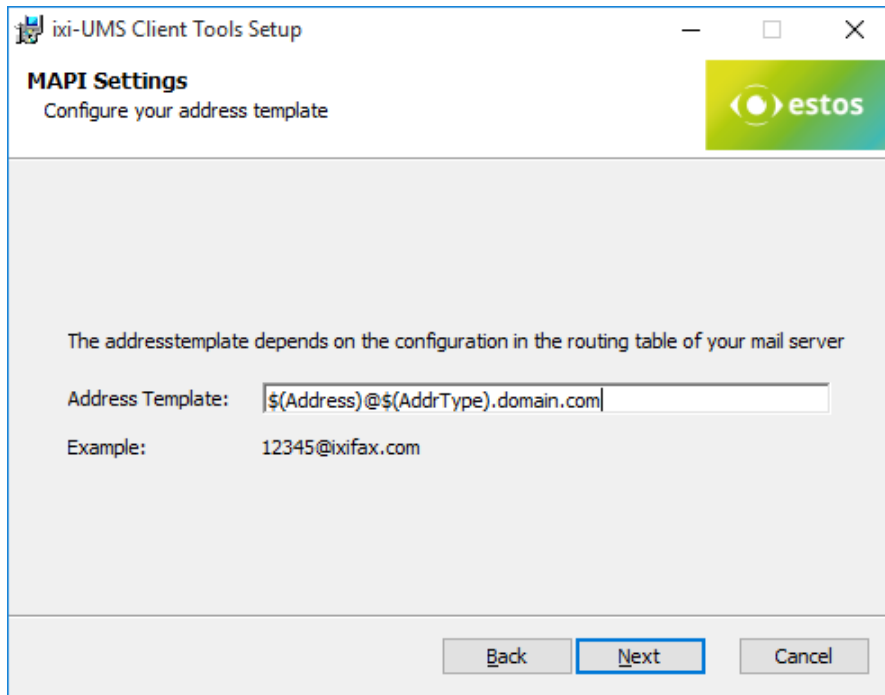
4.7 Platform Settings

Here it is determined how the messages created with the ixi-UMS Client Tools shall be addressed.
The addressing is like an E-Mail-Address and can be checked in the settings of the ixi-UMS Mail Server Connector or in the routing entry in mailserver. The template must include the variables:

- $(AddrType) is replaced by the address type of the recipient address (e.g. Fax, SMS, Voice)
- $(Address) is replaced by the recipient address

Depending on which selection had been made at "Select your Messaging Platform", mail server and / or address templates are offered.

4.7.1 MAPI and Outlook Settings

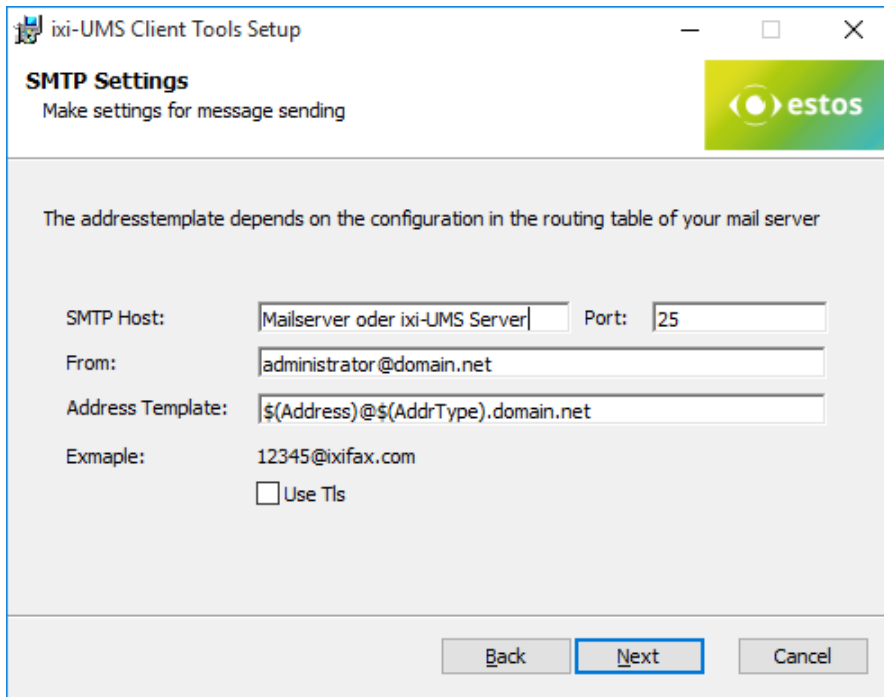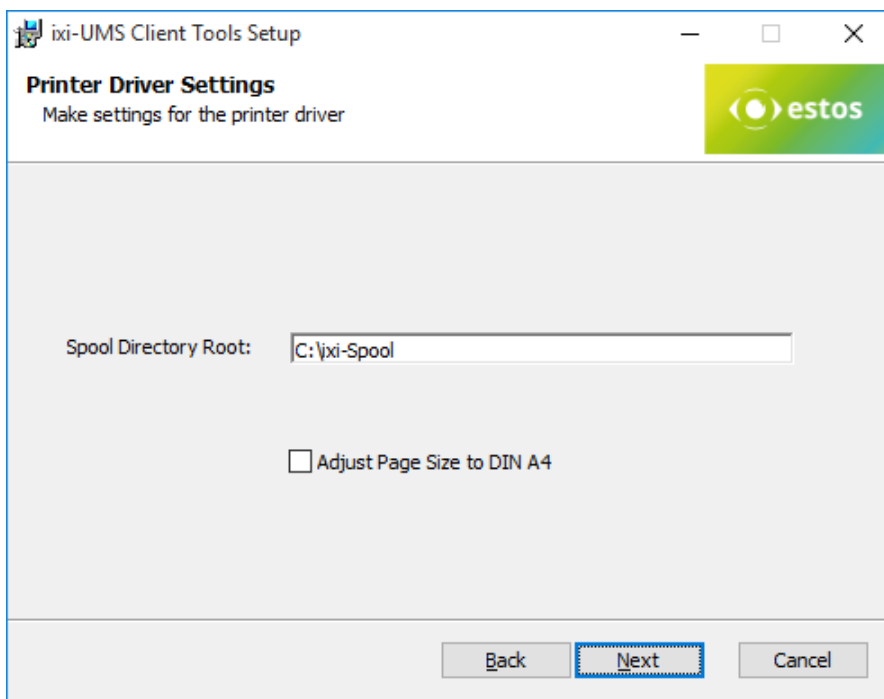The default addressing is offered as addressing:
<Number>@ixifax.com

The domain part most probably has been altered with the installation of the ixi-UMS Mail Server Connector.

The template has to be altered in a way that the address template corresponds with the routing information in the mail server.

4.7.2 SMTP Settings

As "**SMTP Host**", the IP-address of the mail server of the ixi-UMS Mail Server Connector has to be entered.

As the faxes are not sent via the mail client, the sender e-mail address has to entered permanently here. At the clients, a link to the "ixi-UMS Client Tools Settings" in the start menu is established. The users can state their e-mail address via that.

The default addressing is offered as addressing:
<Number>@ixifax.com

The domain part most probably has been altered with the installation of the ixi-UMS Mail Server Connector. The template has to be altered in a way that the **address template** corresponds with the routing information in the mail server.

The connection to the mail server/ixi-UMS Mail Server Connector can be secured by TLS. Prerequisite is that the mail server/ixi-UMS Mail Server Connector is set up for TLS and the required certificate is entered in the certificate store of the workstation.

4.8 Printer Driver Settings

For every user of the ixi-UMS Client Tools, an individual directory is created within the IXI-Spool directory.

The spool directory has to be on a drive / path, on which every has full access.

By default, only the actually labeled part of a document is printed by the printer of the ixi-UMS Client Tools and therewith transferred for delivery. Activate "Adjust Page Size" to create always a Tif in DIN A4-format.

If the fax delivery is handled via the ixi-UMS PS-driver, "Adjust Page Size to Din A4" must not be activated.

If you select "Next", the chosen options are installed.

4.9 Installing Word Macros

The Word macros can be installed during the setup or afterwards.
During the setup, the installation is started automatically.

If the macros shall be installed subsequently, the following files must be called at ...\ixi-UMS Client Tools\MAKRO\<Language>:

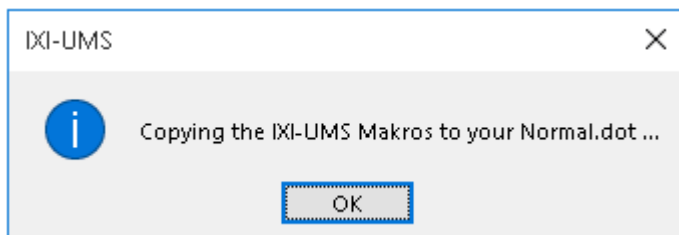- for Word 2010 and higher the file WW2010.dotm

Remark:

- Macros have to be installed per user
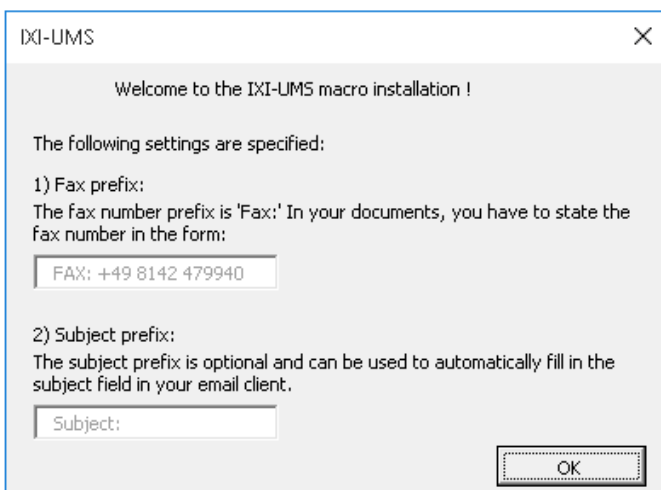- The Macro Security in Word has to be lowered at least to "Medium"
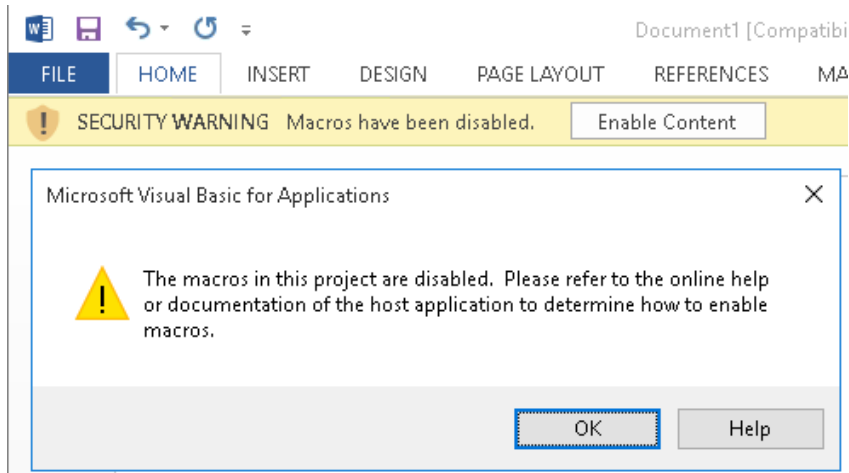
When starting the WW80.dot, Word opens.
If the macro security dajusted is "Medium" or "Low", the following query appears:
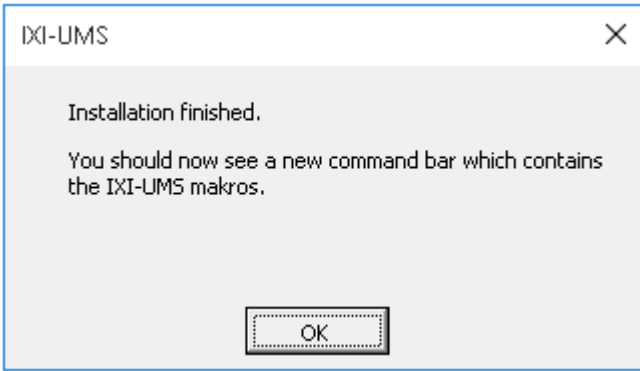
The macros have to be enabled.

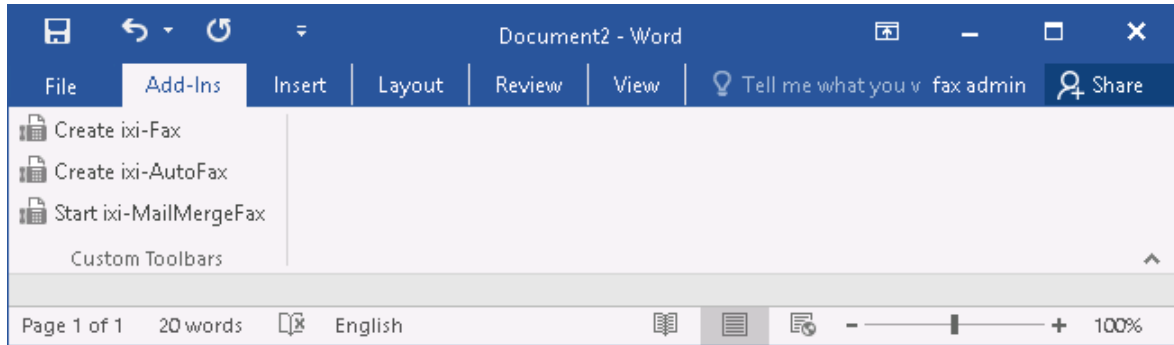The following window appears:

Now the prefixes have to be determined.
This information is important for the Auto fax feature and the mail merge fax feature.

Die Prafixe sind fest vorgegeben und können nur über das Makro selber geändert werden.

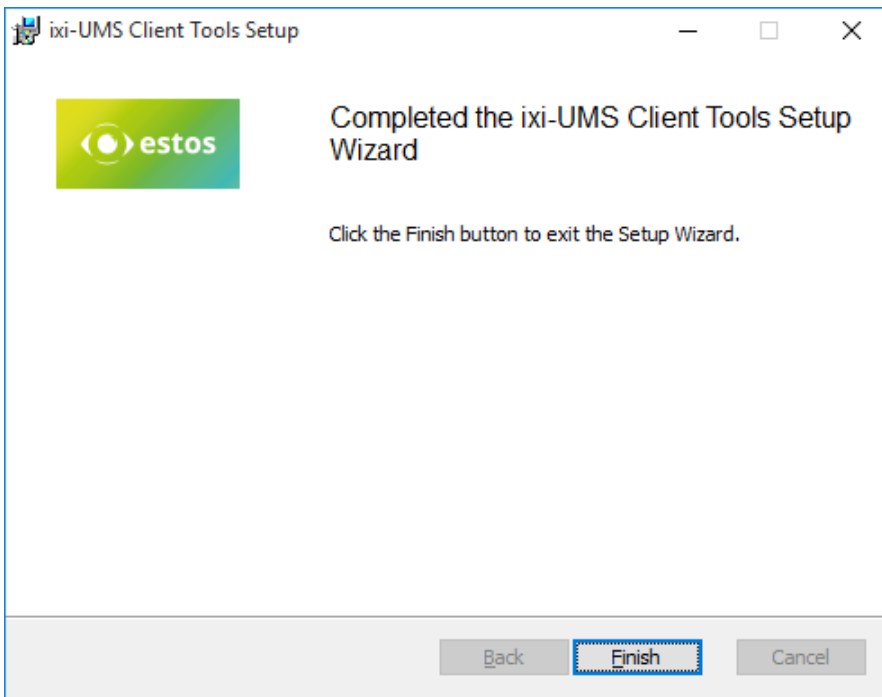If successful, the installation of the macros is confirmed.

The button ixi-UMS now has to be available in Word FOR THIS USER.

Hint:
The Add-In can be easily "uninstalled" again.

4.10 Finish

At the end of the installation (no matter whether with or without Word macros), a respective message is displayed.

5 Info

5.1 About estos

estos GmbH, headquartered in Olching near Munich, Germany, is a leading manufacturer of software solutions with focus on unified communication with unified messaging, fax, voice mail, SMS and CTI (Computer Telephony Integration) with presence and instant messaging. The products of estos GmbH support existing standards like standard interfaces and standard hardware; proprietary solutions are avoided. The company strives to provide its customers with future-oriented product development, with a focus on integration in available environments.

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For more information about estos GmbH and its products, please visit estos GmbH website.

5.2 Version

Software: ixi-UMS Client Tools
Produkt: ixi-UMS Enterprise
Version: 7.10
Manual: Administrator Manual
Date: 11/21/2023